



It is important to note that nearly every function in Horizon can be accomplished in more than one way. You should spend time with the program, getting used to the various functions and experimenting with various keystrokes and methods until you are comfortable and have found the way best for **you** to accomplish the tasks at hand. Feel free to use different methods than are listed in this manual to accomplish procedures. If you have a better way, use it.

Remember that all functions are listed on the screen in some way, either by buttons at the bottom of a dialog box or window; by radio buttons; or by drop down menus accessible from the menu bar at the top of with screen.

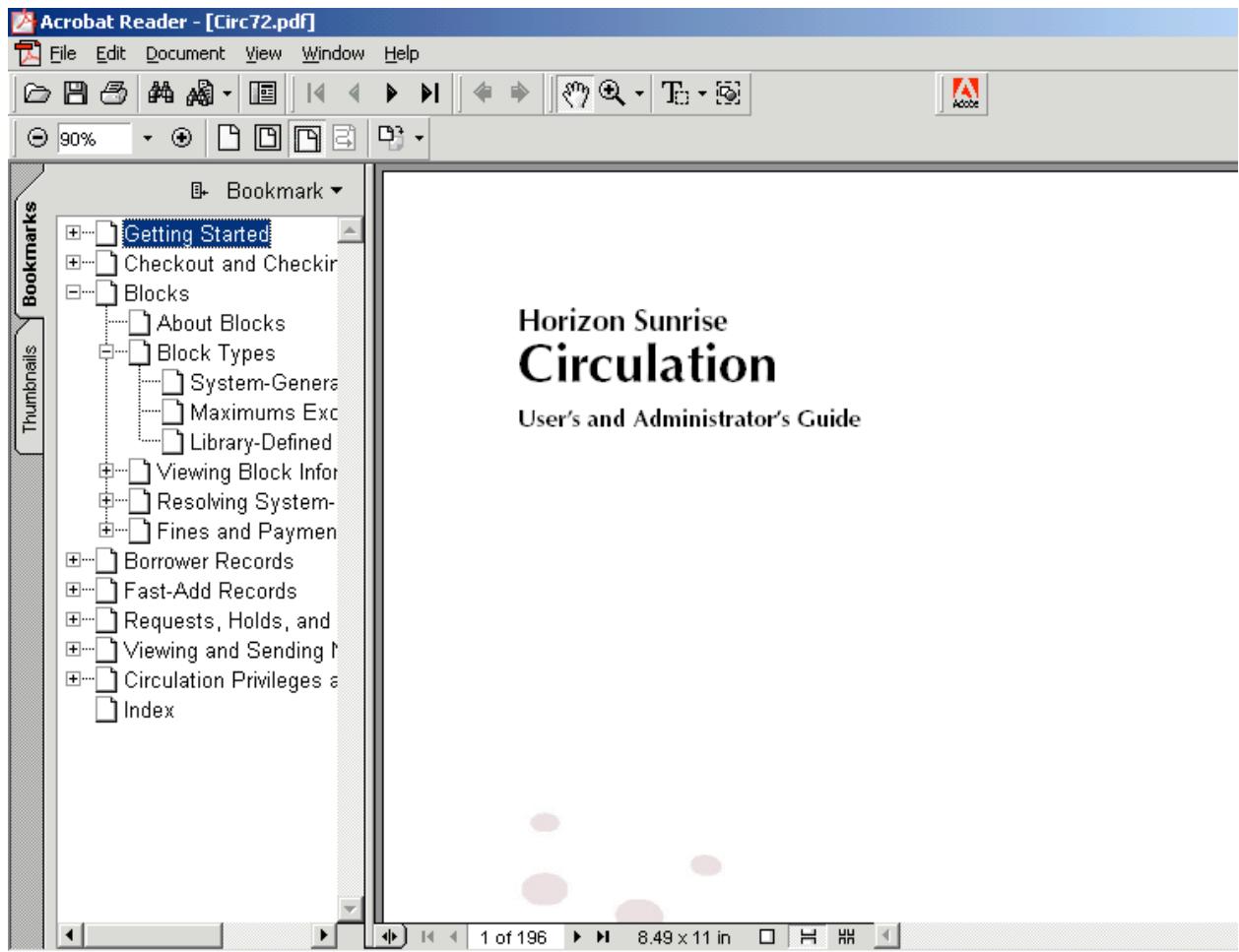
Caution: Be careful about pressing **Enter** or **Return** on your keyboard. This key is “tied” to the **bottom left button** in the window. If that button said **Close**, you

would be closing Horizon by clicking **Enter** instead of entering information you wished to. **So be careful!**

Accessing the User Manual

The Circulation User Manual in Adobe PDF format is available to all Horizon users.

To view this manual, double click on the “**online doc**” folder on the desktop. The system launches Adobe and displays the manual icons for each Horizon application. Click on the **Circulation icon** to open the user’s manual.



The left-hand portion of the screen is a navigational window, much the same as a Table of Contents. Click on the **+** icon to open a folder and see its contents; click on the **-** icon to close a folder and hide its contents. The right-hand portion of the screen is the actual users manual. You can scroll through the pages to access the information needed.

To Change User

When you are finished with your work session, or if you need to leave your workstation unattended, you should change operators.

Click on **File** on the Menu bar. Click on **Change Operator**. Horizon will display the Change operator dialog box.

The hot key for Change Operator is **F3**.

To Log Off Horizon

Save any changes needed in any open Horizon window. Close all open Horizon windows. To close a window, click the **Close button** at the bottom of the window or the **Close button** in the upper-right corner of the window.

Close all open Horizon applications, by clicking on the **- icons** on the navigation bar.

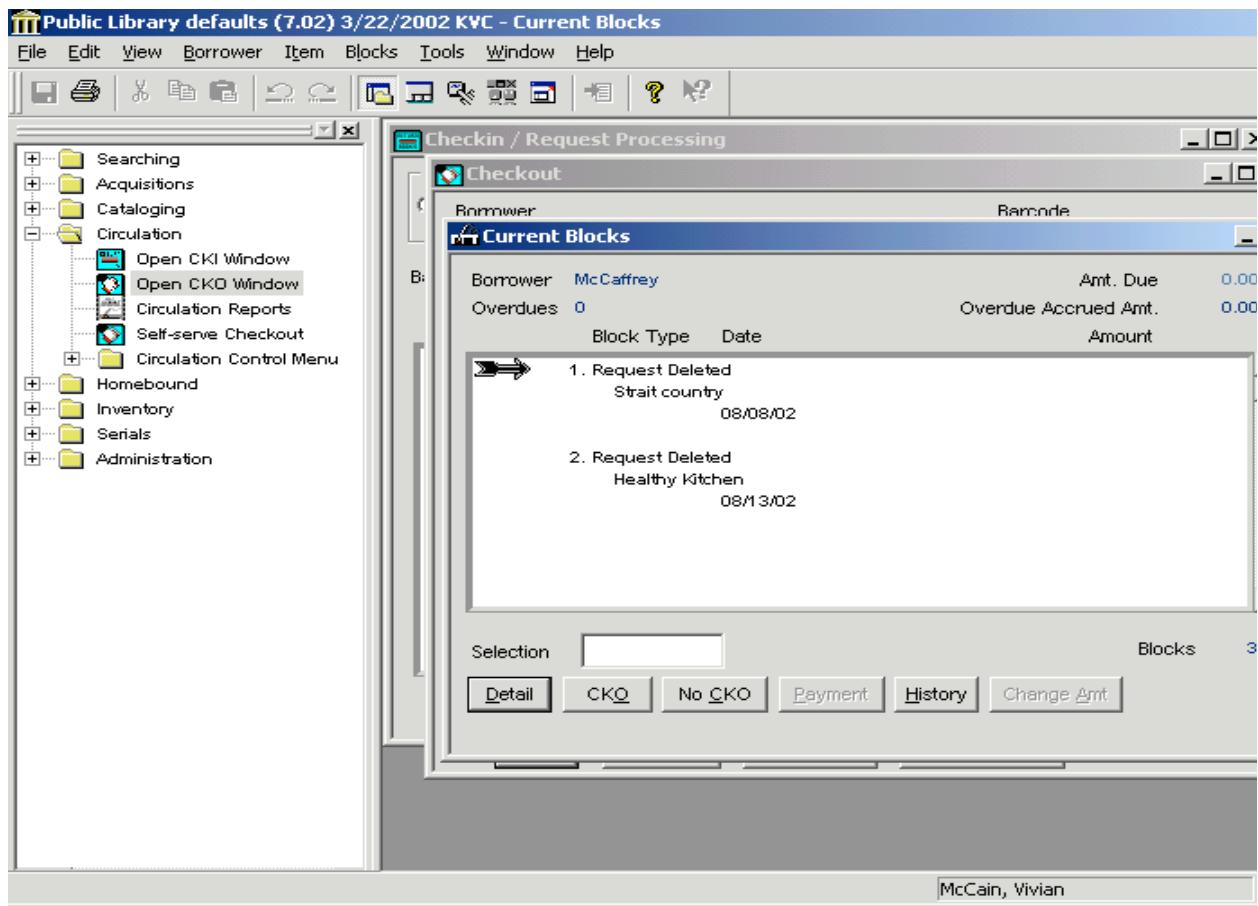
Click **File** and **Exit**, or click on the **Close button** in the upper-right corner of the window.

Checkout

You should keep both the **CKI** and **CKO** windows open all the time in circulation. You can toggle between the two functions by clicking on the bottom dialog box and bringing it to the forefront making it active; by turning on the “**toggle workbook**” button and clicking on the tabs at the bottom of the window; or by pressing the **F8** key.

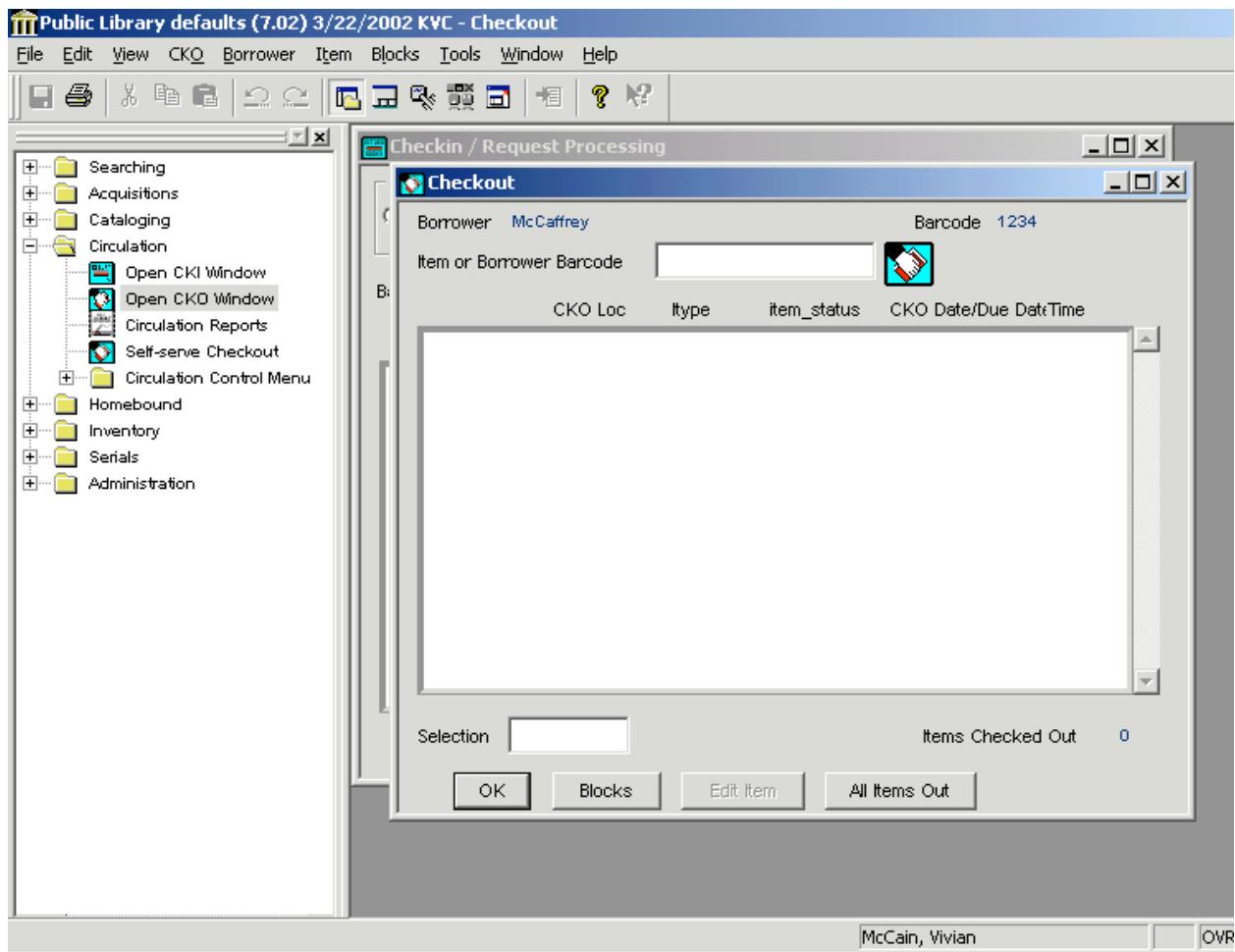
To check out an item, first identify the borrower (previously called patron), by scanning their library card or manually typing in the barcode of their library card. The system clears the barcode entry box, so that you may scan in an item barcode. If you manually enter the barcode, you must click **enter** or press **OK** to complete the function.

Various messages could appear when you identify a borrower. If a message box displays, follow the instructions to resume or cancel CKO procedures. When the following borrower was identified, a “**Current Blocks**” dialog box appeared. In order to continue the process of CKO, you must press the **CKO** button. If this were a monetary block or message that said ‘do not check out’ for some reason, you would press the **NO CKO** button.



Buttons found on the **CKO** window:

- **Blocks** – Press this button to list **current blocks** for the borrower identified.
- **Edit Item** – Press this button to edit circulation information for the item identified in CKO. You can **change an item due date** here and also see **last patron** here (prior circ info).
- **All Items Out** – Choose this button to **list** all the items currently checked out to the borrower identified. Those items with a status of Lost and Claim Returned will also be listed.



Note: In the window above, no item has been identified so the Edit Item button is “grayed out” – that is, not operational.

Editing an Item in CKO

You would use this function to change a due date on ILL materials or if instructed by a supervisor to change a date for some reason.

1. Identify the borrower by scanning their barcode.

2. Identify the item by scanning the item barcode.
3. Press the **All Items Out** button to list the items checked out. Identify the item you wish to edit.
4. Press the **Edit Item** button to bring up the edit dialog box.
5. Change the due date using this formula, **01-01-2002**. Do not change the time. This is a function used by universities, not public libraries.
6. Choose **Save**. The CKO window will display the new date in the list box.

If you need to change the dates on more than one item, **select all** the items needing to be changed. Click **Edit item**. A dialog box will appear asking if you wish to make a batch change. Click **OK**. Enter the new date. Click **Save**.



Declaring an Item Claim Returned

You will sometimes need to change the status of an item to **Claim Returned**. You should still follow standard circulation policies in handling this situation.

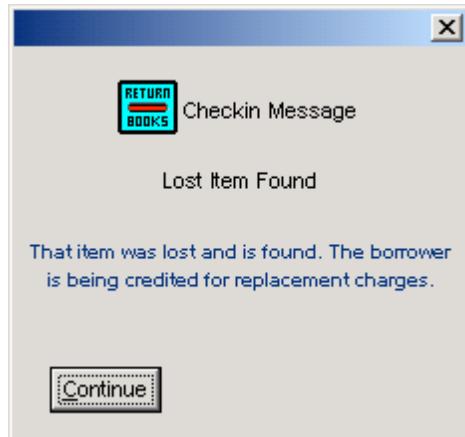
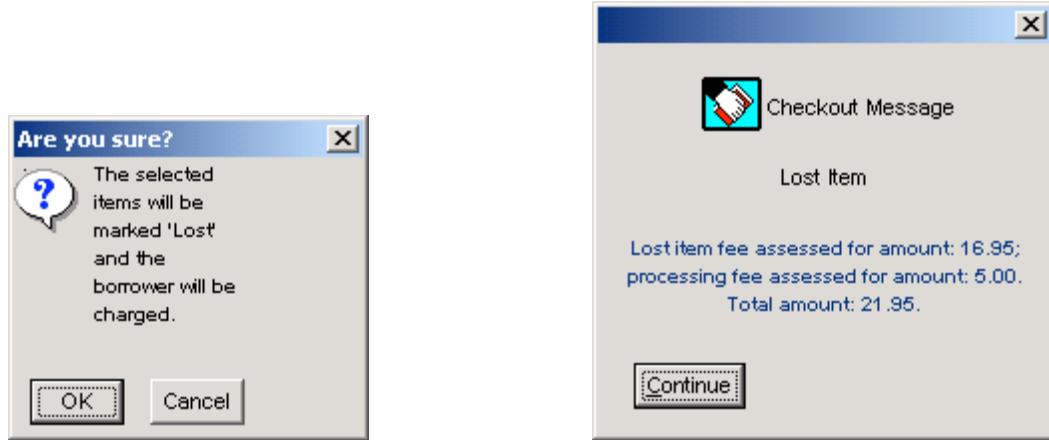
1. Identify a borrower in CKO.
2. Click **All Items Out** to display the list of items charged out to the borrower.
3. Select the item from the list.
4. Go to the **CKO menu** on the menu bar. Select **Claim Returned**.
The system changes the status on the items out list to reflect the Claim Returned status.

Declaring an Item Lost

Occasionally, you will need to declare a checked out item "Lost."

1. Identify the borrower in CKO.
2. Click **All Items Out** to display the list of items currently charged out to this borrower.
3. Select the item from the list.
4. Go to the **CKO menu** on the menu bar. Select **Lost**. The system displays a dialog box informing you the status is being changed to Lost.
5. Click **OK**.
6. A second dialog box appears, giving you the cost of the item, plus processing fee that is being added to this borrower's record.
7. Click **Continue**. The Lost item remains on the borrower's record until either paid or waived by the library.

If an item declared Lost is later found and checked in, the system will display a box informing the staff of the occurrence. Click **Continue**.



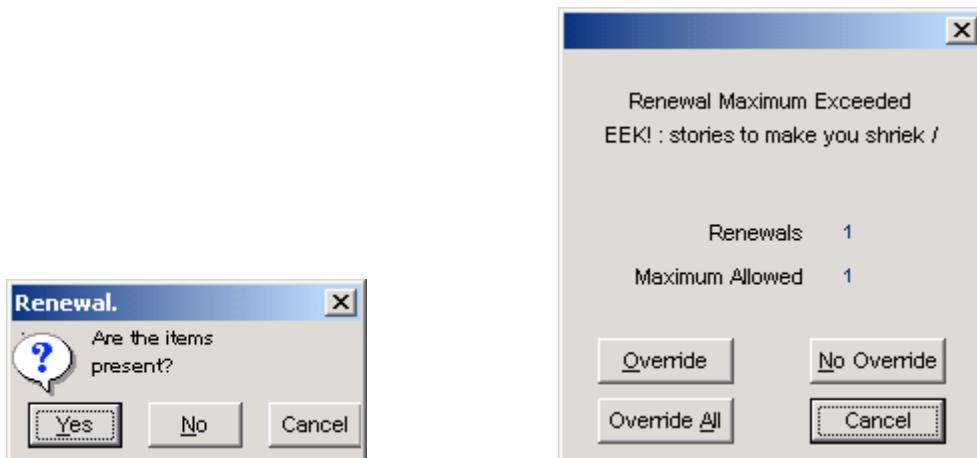
Renewing Items

DO NOT check in the items and then check out again. This is not a renewal. It is a new check out. This is a circulation policy that must be followed in order for our statistics to be accurate.

1. Identify the borrower.
2. Click the **All Items Out** button to display the list of items charged out.
3. Select the Item(s) to be renewed.
4. Go to the **CKO menu** on the menu bar. Click on **Renew**. If you wish to renew everything checked out, click **Renew All**.
5. Choose **Yes** if items are present; choose **No** if items are not present.
(It is policy to not renew the items if they are not present.)

Horizon renews the items and displays the new due date in the list box. If you specified the items were not present, Circ counts the renewal as a phone renewal. Be sure and follow standard policy here.

If an item is on hold or has been renewed before, it is not available for renewal. You will be given a display box, should this occur. Press **No Override**.



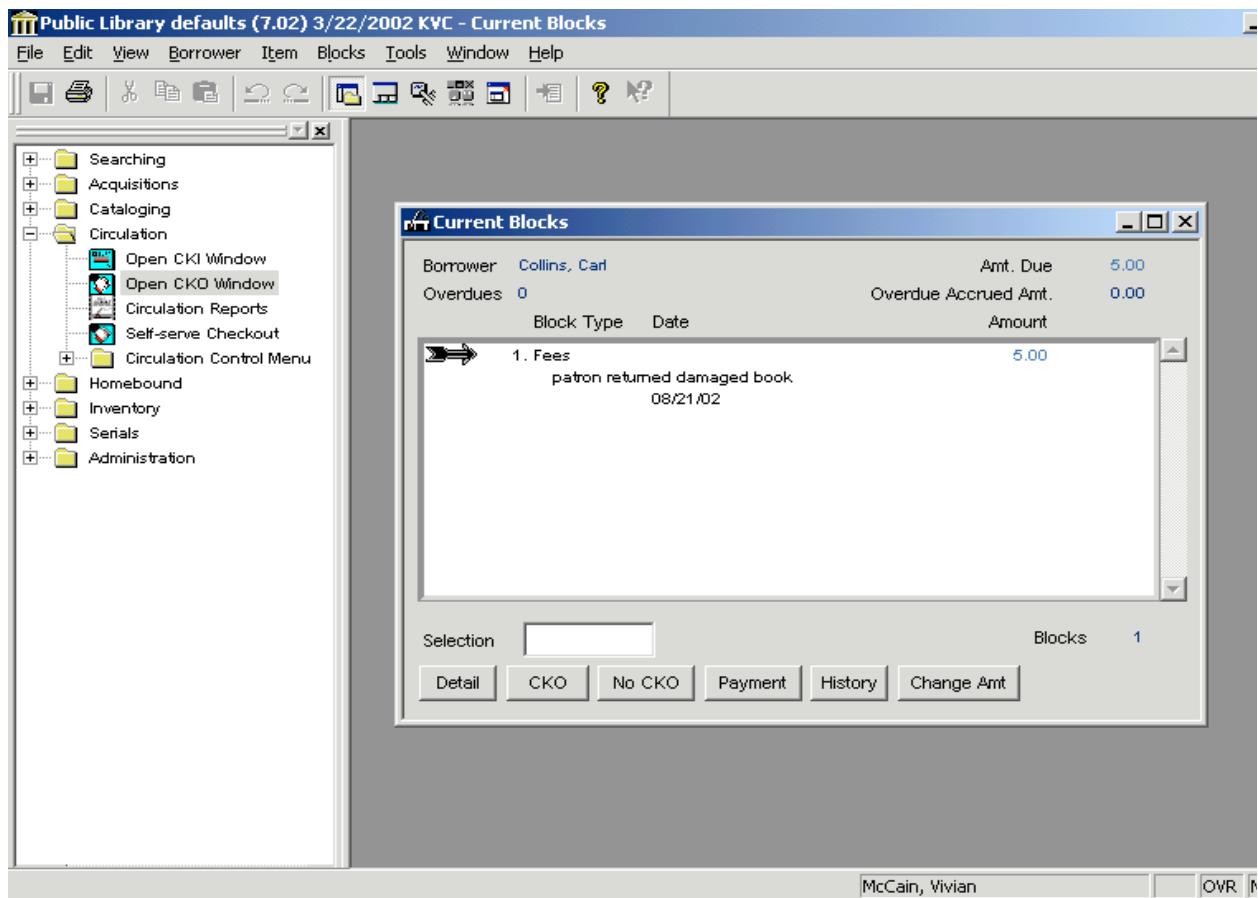
Blocks

Blocks are flags that interrupt the normal checkout process. They may tell you that the borrower has overdues, owes fines, has a lost item, or there might be a special message to the borrower such as an address change needed.

Some blocks are system-generated and are automatically placed on a borrower's record. These are overdues, fines, hold notifications, and lost charges, among others. There are many blocks not mentioned here. You can see your system administrator for a complete list of blocks system-generated.

Library-defined blocks are those manually placed by the staff and they include special messages and fees such as rewind charges or library card replacement charges.

You can view the **Current Blocks** window from both CKI and CKO. From this window you can view detailed information on each block, a history of past blocks, override the blocks to cko, conduct payment transactions or deny cko. You can also view the amount owed to the library, number of overdues, and amount of fines accrued if those items were cki at that time.



To view blocks:

- Automatically – When you enter a borrower's barcode in the CKO window, the system checks to see if the borrower has any blocks. If blocks exist, an audible signal is heard and the **Current Blocks** window is displayed.
- Manually – If you have already identified a borrower who has blocks and have overridden the **Current Blocks** window, you can click on **Blocks** at the bottom of the CKO or CKI window to redisplay those blocks.

Buttons on the Current Blocks window: (this window shown on previous page)

- **Detail** – Allows you to view more details about the current block than is shown in the summary.
- **CKO** – Overrides the blocks and allows checkout.

- **No CKO** – Denies circulation privileges.
- **Payment** – Allows a monetary transaction and records it.
- **History** – Allows you to view past blocks on the borrower's record.
- **Change Amount** – Allows those staff members with adequate security to change the amount of a monetary block.

Other information found on the Current Blocks window:

- **Borrower Name**
- **Overdues** – displays the current number of overdue items checked out
- **Amount Due** – displays the total amount of fines currently owed. This is the amount that can be paid.
- **Overdue Accrued Amount** – this is the amount of fines that would be owed if all materials were returned at that time.
- **Selection** – lets you type the number of the block in this box that you wish to work with – same as selecting the item.

Block Detail window

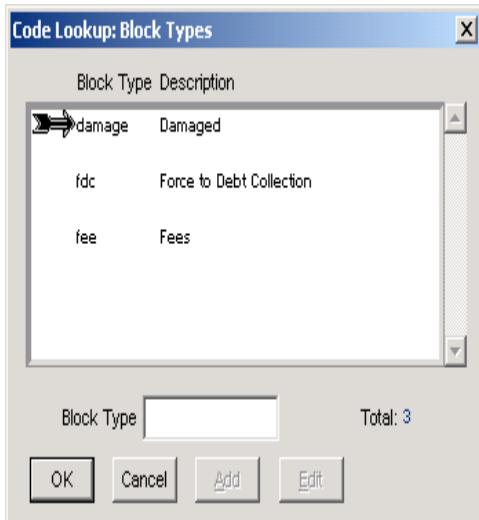
A **Block Detail** gives you more detailed and specific information about a particular block. Information found here includes:

- Block type
- Date block was placed
- Date item was checked out
- Date item was due
- Date item was actually returned
- Date the block was issued
- Payment amount owed (if any)
- Comments can be added to the block by clicking the **Comment** button.
- **Delete** button – actually deletes the block. It will be kept in history automatically.

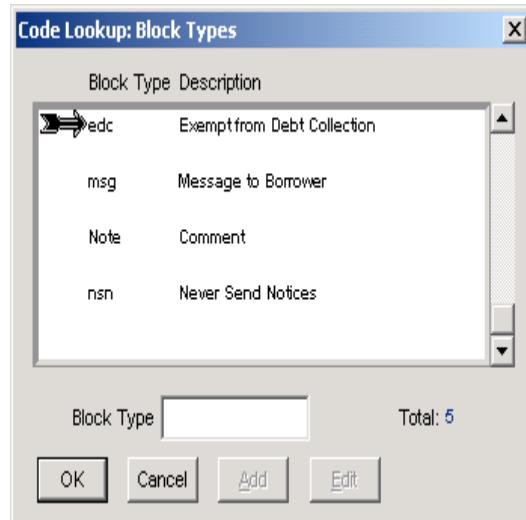
Adding a Block

You will sometimes need to add a block to a borrower's record. This might be fees for videos returned without being rewound, for payment of a new library card, for disallowed materials being returned in bookdrop, or for damaged items, among other things. You may also need to add special messages such as address change needed.

1. Identify the borrower in CKO.
2. Go to the **Block menu** on the menu bar.
3. Click on **Add Fee** or **Add Note**.
4. Identify the **Code** for the type fee/note being placed.



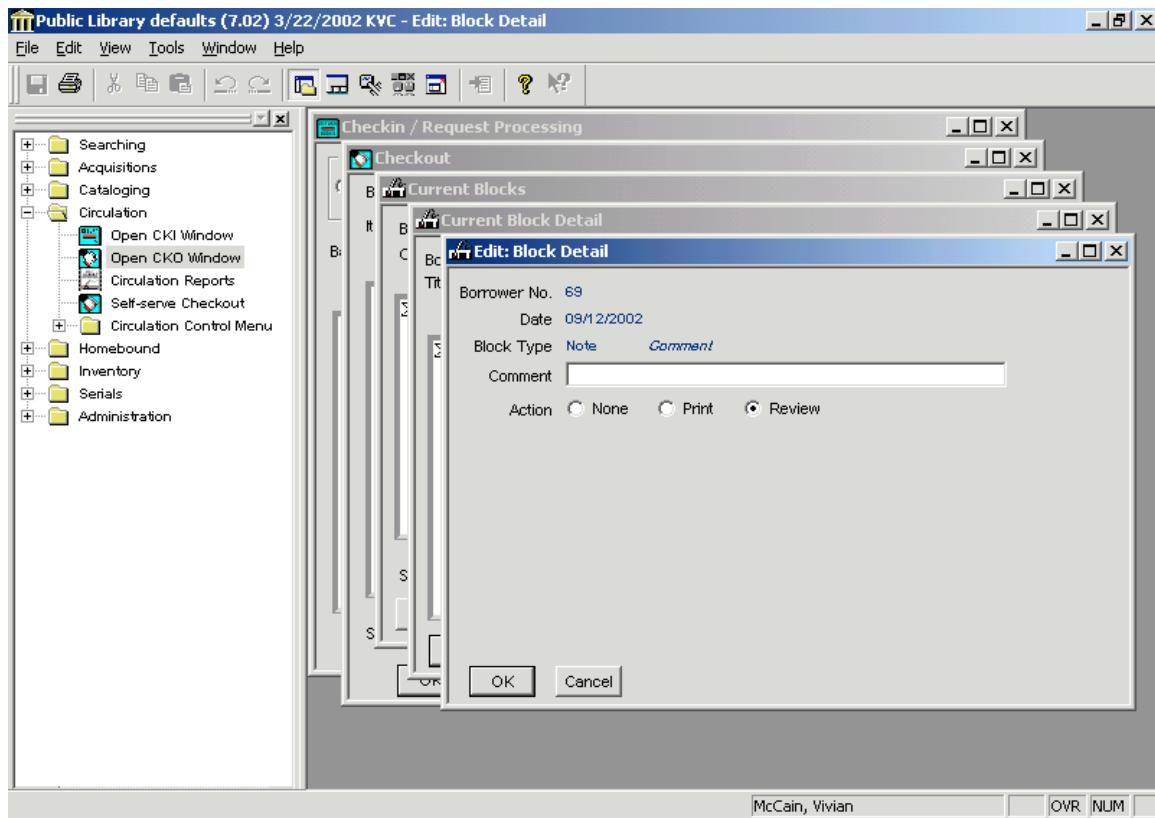
(Block types for Fees)



(Block types for Notes)

1. Click **OK**.
2. A dialog box will appear with spaces for you to fill in. Fill them in, always adding your initials after the comment.
3. Click **OK**.

4. The block will automatically appear in the **Current Blocks** window. You may **Close** at this time or take the appropriate action to clear the block.



There are three radio button to select the action type. **Review** is selected by default. There is no need to change this.

Deleting a Block

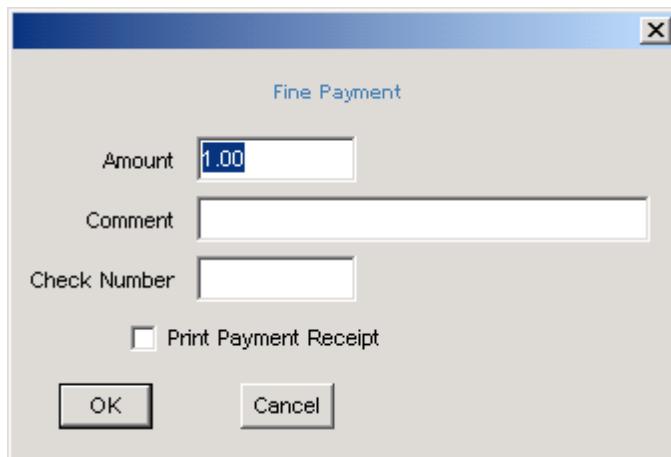
Running Day End will delete blocks according to the parameters set up by the System Administrator. However, there may be blocks that need to be deleted manually.

1. Identify the borrower in the CKO window.
Because there are unresolved blocks, the **Current Blocks** window will display.
1. Select the block to be deleted.
2. Click the **Delete** button.
You will be asked "are you sure?"
1. Click **OK**. The system deletes the block and keeps it in history.

Fines and Payments

As with many Horizon features, there are 2 ways to take a payment or waive a charge. All circ workers will be able to take a payment; only supervisors have the security level required to waive.

1. Identify the borrower in the CKO window. The **Current Blocks** will appear.
2. Select the fine block you wish to pay or waive.
3. Go to the **Blocks menu** on the menu bar. Choose either **Payment** or **Waiver**.
4. A dialog box appears. Enter the **amount** to be paid, a **comment** if needed, and the check number if charge is being paid by check. **YOU MUST ALSO CHECK THE PRINT RECEIPT CHECKBOX**. This will enable our printers to print out a receipt of the transaction.
5. Click **OK**.
6. The **Current Blocks** window reappears and shows new amounts for any unresolved charges. The total amount due is updated to reflect the payment or waiver.



*****Always check the box labeled Print Payment Receipt.

A second way to receive a payment:

1. Identify the borrower in the CKO window. The **Current Blocks** will appear.
2. Select the block you wish to pay.
3. Click the **Payment** button at the bottom of the window.
4. The dialog box shown above will appear. Enter the **Amount**, **Comment**, and

Check Number. BE SURE TO CHECK THE PRINT PAYMENT RECEIPT BOX in order to print out a receipt.

5. Click **OK**.

You cannot **Waive** from this location, but you can **Change Amount** by clicking the appropriate button at the bottom of the window.

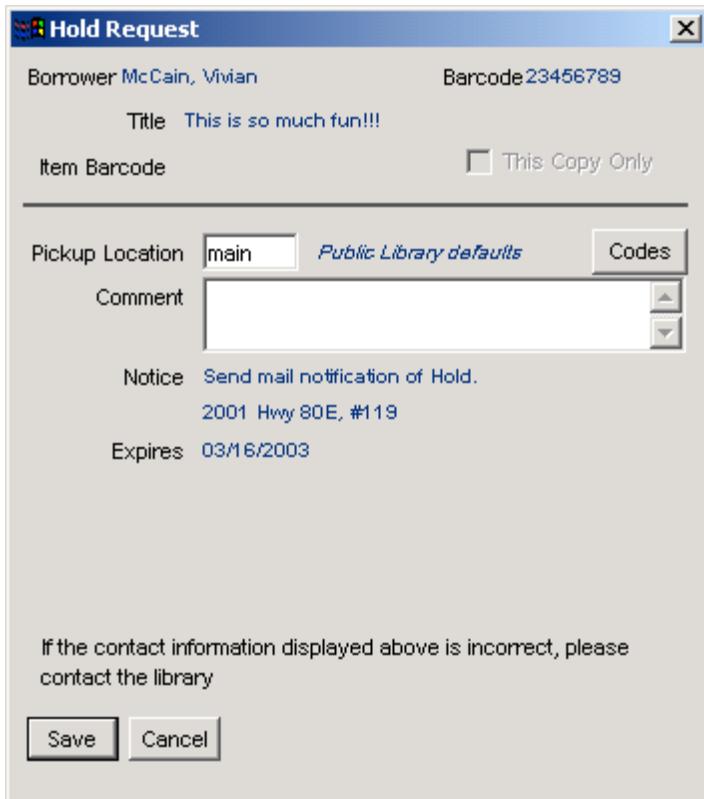
Requests and Holds

It is important that you realize there are two terms of importance used in Horizon. They were used interchangeably in Dynix – not so in Horizon. They mean very different things now, so forget what you knew about these terms in the past.

A **Request** is made by library staff or by borrowers who wish to have an item reserved for them to pick up when it becomes available. When this item is available for pickup, it is referred to as a **Hold**. An item is called a **Hold** when it actually has a status of “**on hold**.”

Placing a Request for a Borrower

1. Identify the borrower in CKO.
2. Search for the requested item. Press **F2** to bring up the Search screen.
3. If Horizon displays a Titles List window, highlight the item you want. If a Bibliographic Detail or Copies window appears, no highlighting is needed. Go straight to the next step.
4. Go to Request on the menu bar. Choose Make Request or press F5. The Hold Request window will be displayed.



1. The pickup location is defaulted to the location where the request is being made. If you wish to change this location, click the Codes button to show the possible pickup points. Choose the correct code. Click OK.
2. You may have need to enter information in the Comment field at this time.
3. Click Save.
4. A Request Made box will appear. Click OK.



Placing a Specific Copy Request

1. Identify the borrower in CKO.
2. Search for the requested item by entering **F2**.

3. On the **Bibliographic Display** window, click **Show Copies**.
4. Highlight the COPY you wish to request.
5. Go to the **Request** menu on the menu bar. Click **Make Request**.
6. The **Hold Request** window will appear. Continue as above.

Editing a Request

Any time **before** a requested item has actually been checked in a placed on the hold shelf, it can be changed or edited in several ways. You can change pickup point, add comments, change hold expiration dates, or suspend the request. Suspending the request allows the borrower to be kept in the queue if they are on vacation and it will not be filled until the “suspend until” is reactivated. Security must be enabled to accomplish these tasks.

1. Identify the borrower in CKO.
2. Go to **Borrower** on the menu bar. Click on **Requests**.
3. The **Borrower's Request** List window appears.
4. Click **Edit**. The **Edit Request** window appears.
5. Make needed changes. Click **Save**.
6. To close the window, click **Cancel** or press **ESC**.

Deleting a Request

1. Identify the borrower in CKO.
2. Go to **Borrower** on the menu bar. Choose **Requests**.
The **Borrower's Request List** window appears.
1. Highlight the request to delete.
2. Click **Delete**. You will be asked if you want to delete this item.
3. Click **OK**. This will remove the request from the list. DO NOT click **Cancel** unless you wish to cancel the operation you are in. **Cancel** does not get rid of the request. Only **Delete** gets rid of the request.

Filling a Request

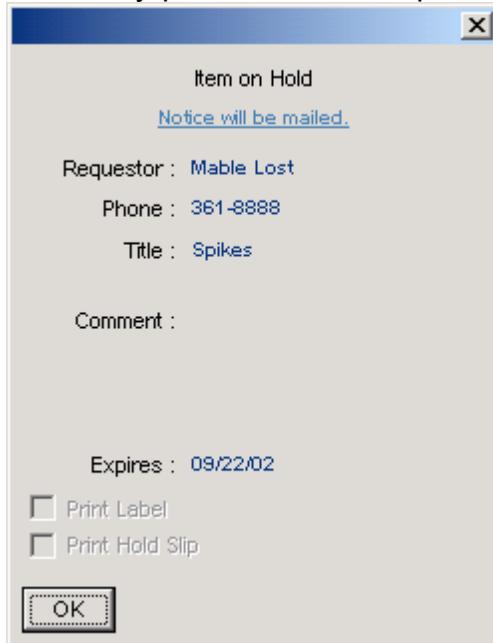
1. Check in the item in **CKI**.
Horizon displays a window telling you the item is on hold and for

whom it is being held. It may also tell you to send that item to another location.

1. Check the box labeled **Print Hold Slip**.
2. Click **OK**.

The hold slip will be printed and the status will change to **Being Held**.

1. Follow library procedure in completing the hold process.

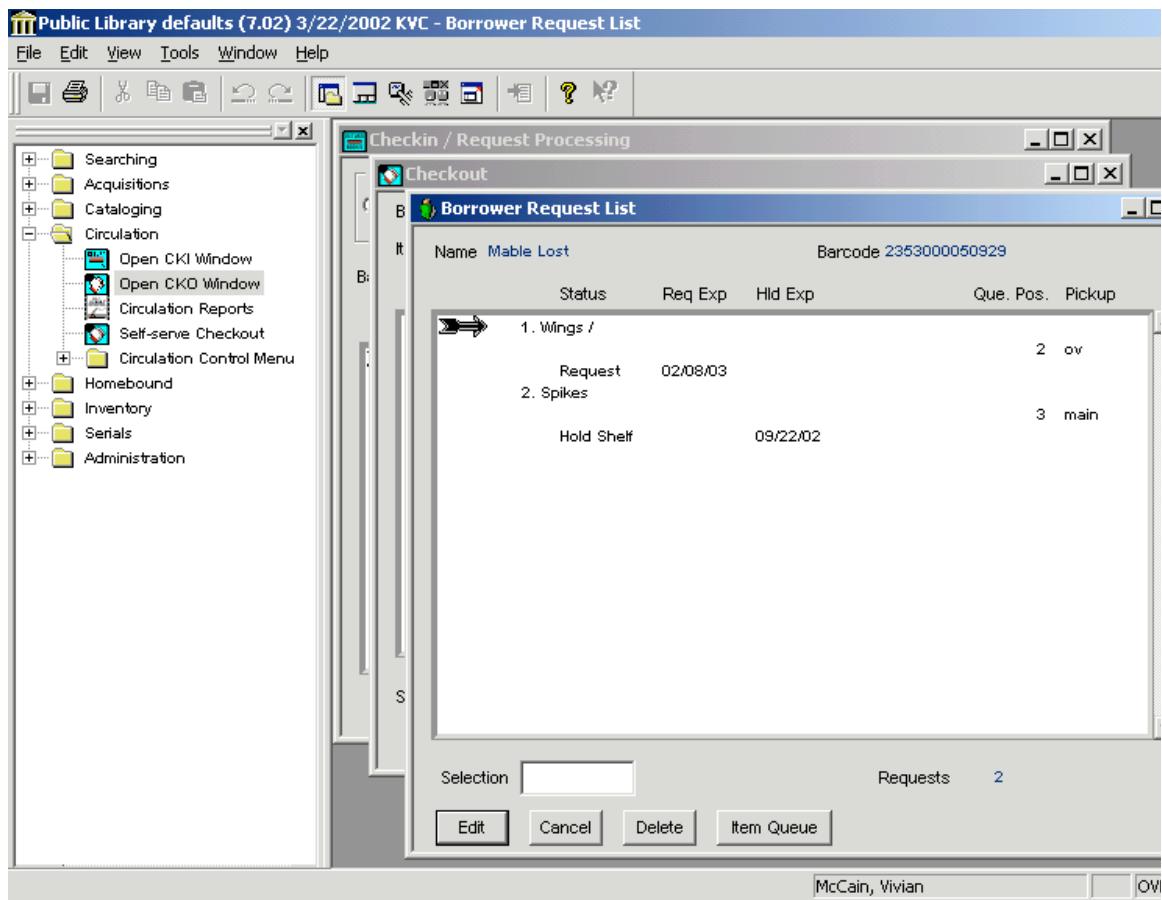


Don't forget to check **Print Hold Slip**.

What do I have on hold?

This is a question often heard at the circulation desk. To view a borrower's request follow this procedure.

1. Identify the borrower in **CKO**.
2. Go to **Borrower** on the menu bar. Click **Requests**.



In the above example, the borrower has 2 requests. The first item, *Wings*, is on request; the request will expire Feb. 8, 2003; she is number 2 in the list and her pickup point is Ouachita Valley. The second item, *Spikes*, is currently being held; the hold will expire Sept. 22, 2002 and the pickup point is Main.

1. If you wish to delete a request, highlight the request. Click **Delete**.
2. If you want to see a list of other borrowers who have requested this item, click **Item Queue**.

Overriding a Hold

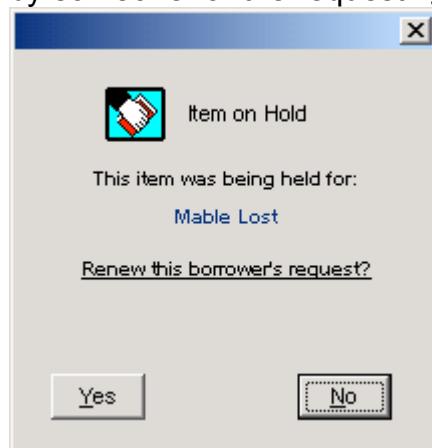
There may be occasion too override a hold for one borrower and check out the item to another. If an item is found on the shelf, the library has made a mistake in reshelfing that item. The patron should not be penalized, so the item will be checked out to that patron and the requester's record will be corrected with item at the top of the queue. You may also have to override should a wife send a husband to pick up her holds without sending her card, and the patron uses his own card.

To override a hold

1. Identify the borrower currently checking out in CKO.
2. Scan the item. Horizon will display the name of the borrower who has requested the item.
3. Click Yes to override the hold and check out the item.



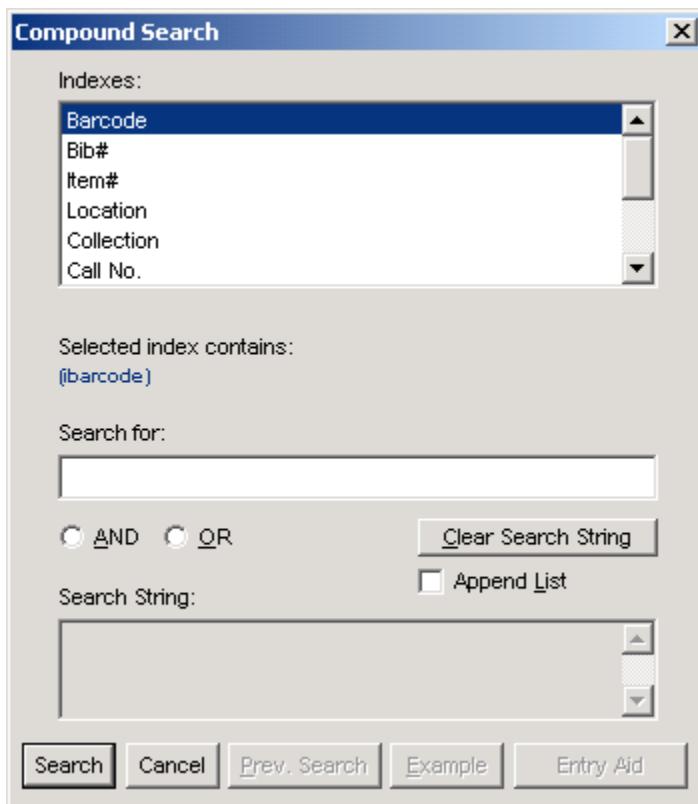
You will be asked do you wish to renew this borrower's request. If the item is found on the shelf, click Yes. If the item is being checked out by someone for the requesting party, click No.



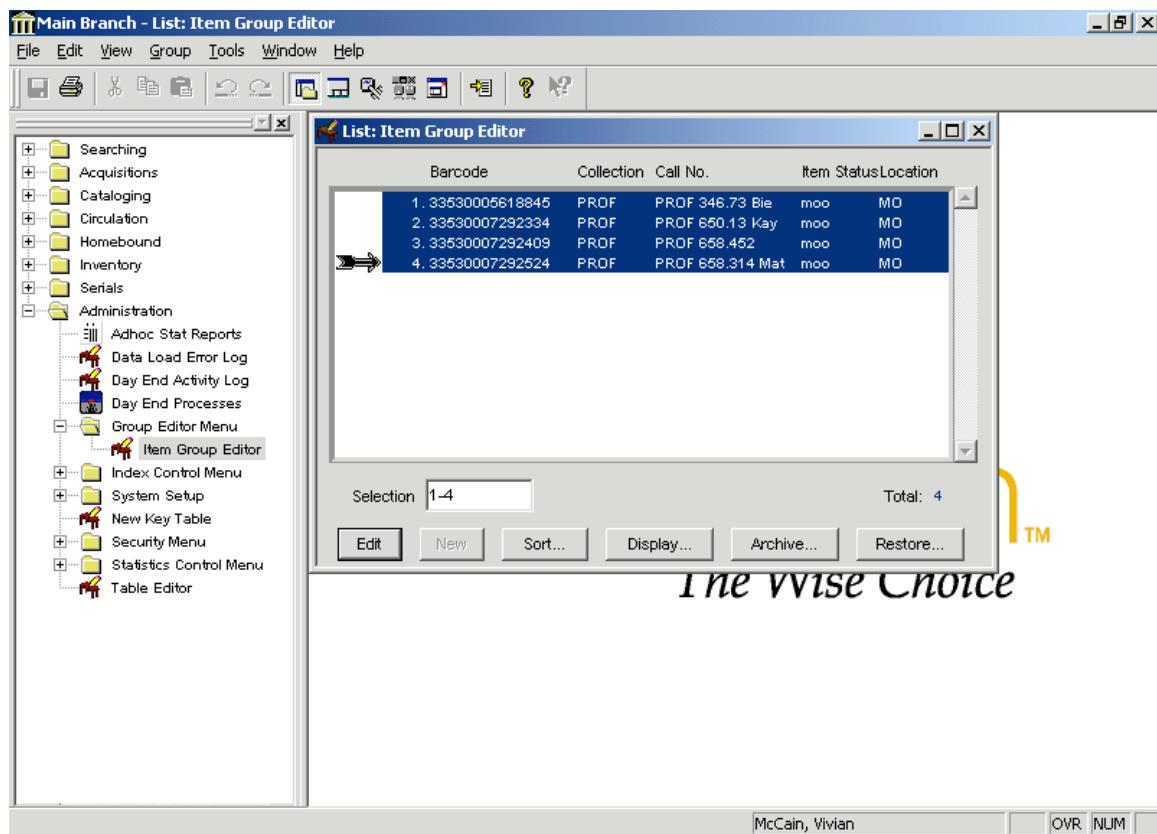
Changing status or location

In Dynix, this function was called changing an item variable or updating status of an item (**CIV or USI**). In Horizon, this function is carried out through the **Item Group Editor**.

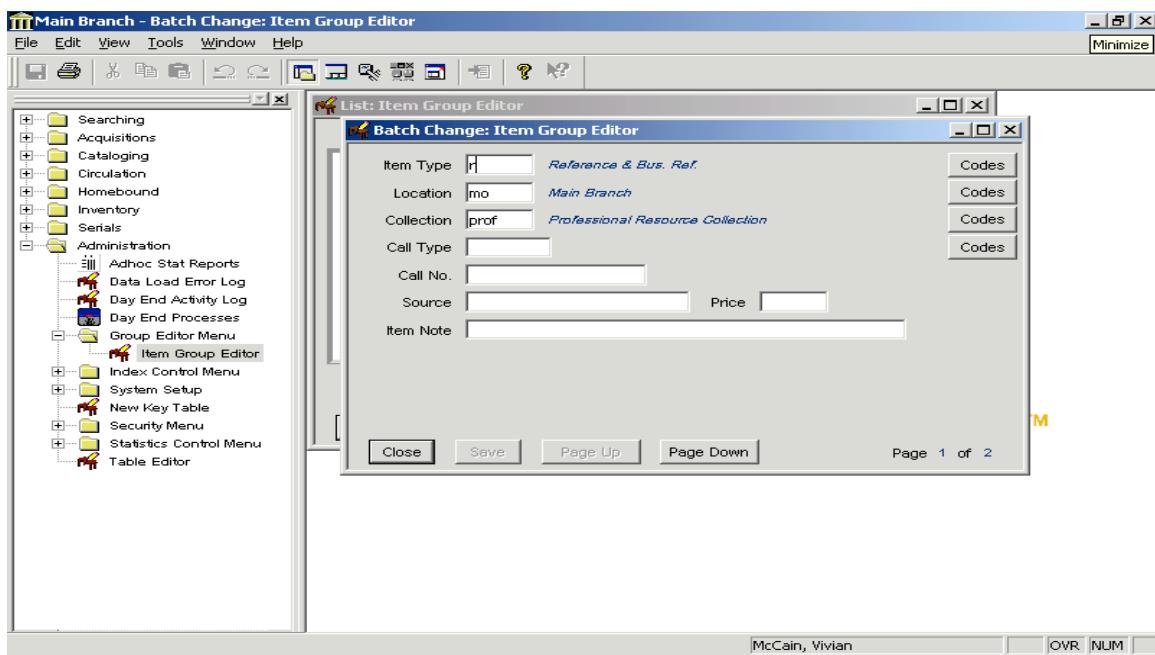
- Click Administration in the navigator.
- Click on Group Editor Menu.
- Click on Item Group Editor. A Compound Search box will appear.



For most of our purposes, we will search by barcode. If you are searching for more than one item, be sure to check the **Append List** box. It appears that you aren't doing anything by scanning barcodes – they are being entered on the window **behind** the search window. When you have entered all the items you wish to change, close the Search window. You will see the **Item Group Editor** window.



Select the items you wish to change. Click **Edit**. You will be asked if you wish to make a batch change. Click **OK**. The **Batch Change** window will appear.



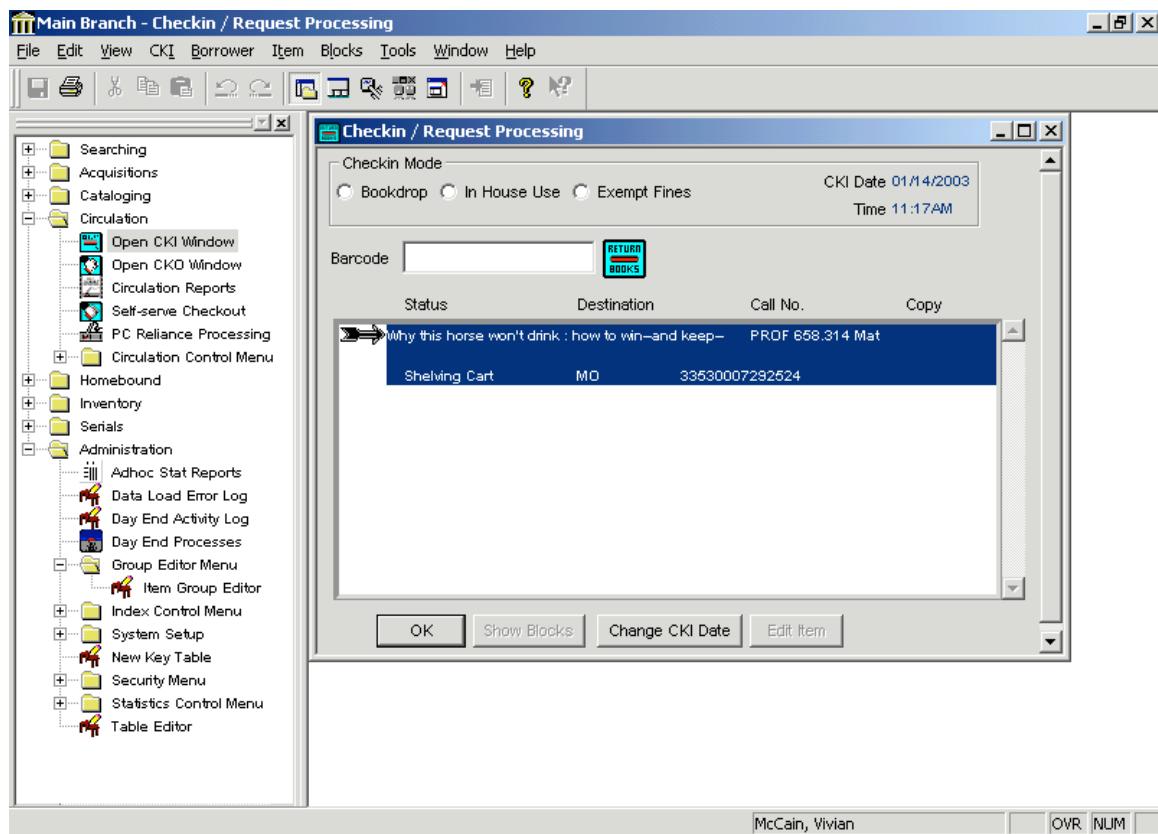
Change the necessary information. **Save and Close**. When you are ready, you can restore the change you just made by clicking **Restore** instead of **Edit**.

Check In

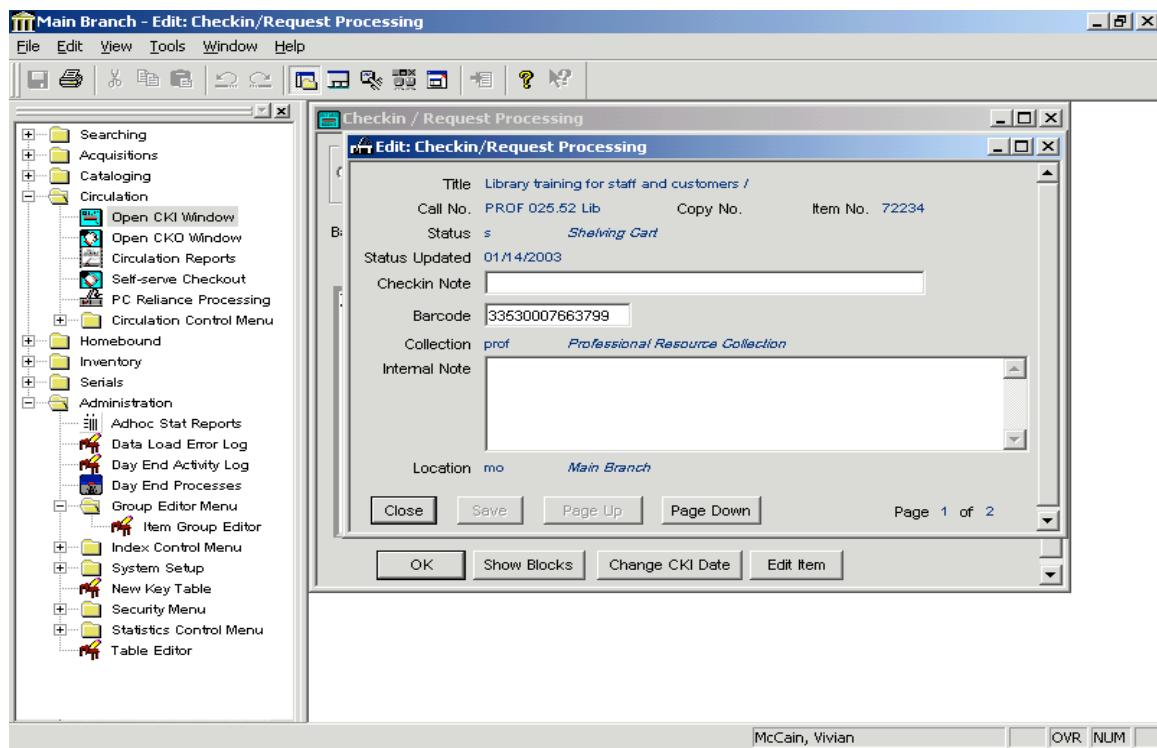
Toggle to CKI from CKO by using the **F8** key or open CKI window from the navigational bar.

You will notice 3 modes of Checkin: **Bookdrop**, **In House Use**, and **Exempt Fines**. If this is anything other than a regular checkin, choose the correct radio button. If an item has been found on the shelf and a supervisor is unavailable to **Exempt Fines**, Change the checkin date, by clicking on the **Change CKI Date** button.

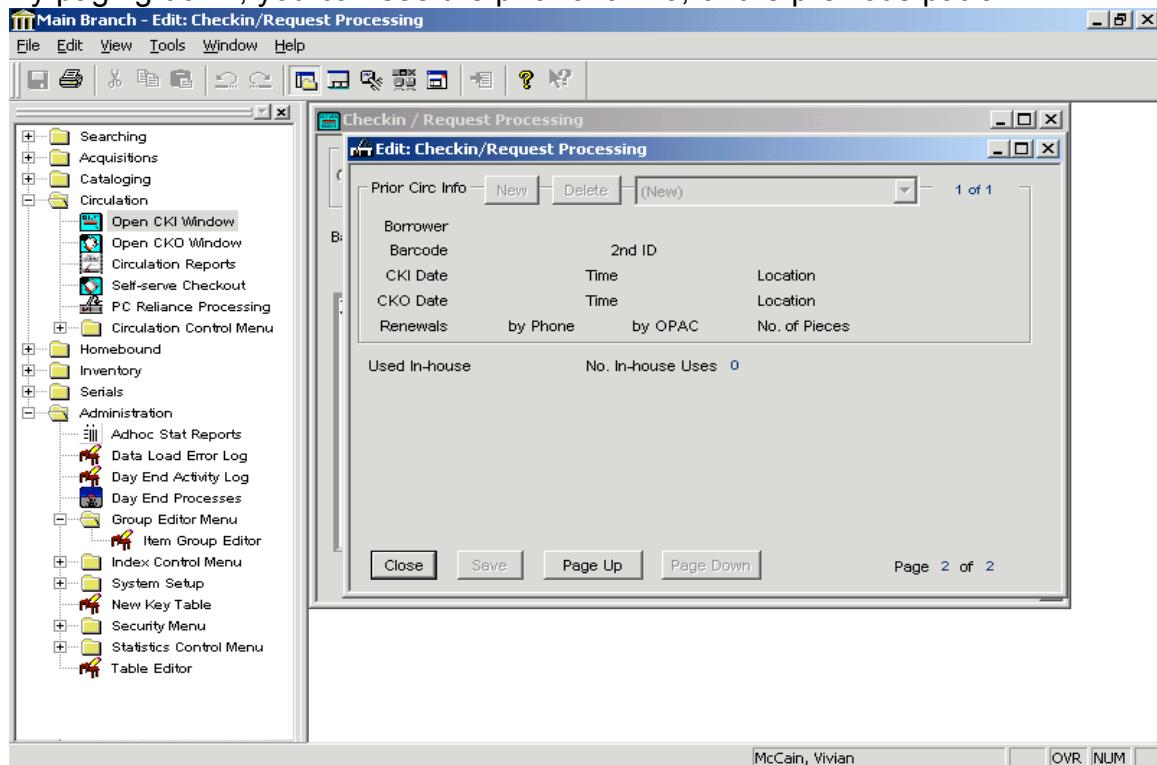
Notice: When you click on **change check in date** or **bookdrop**, the CKI Date in the upper right corner changes to the date needed and is shown in italics.



When you have checked in an item, you can then edit it, by clicking Edit Item. You can add a check in note or an internal note, if needed.

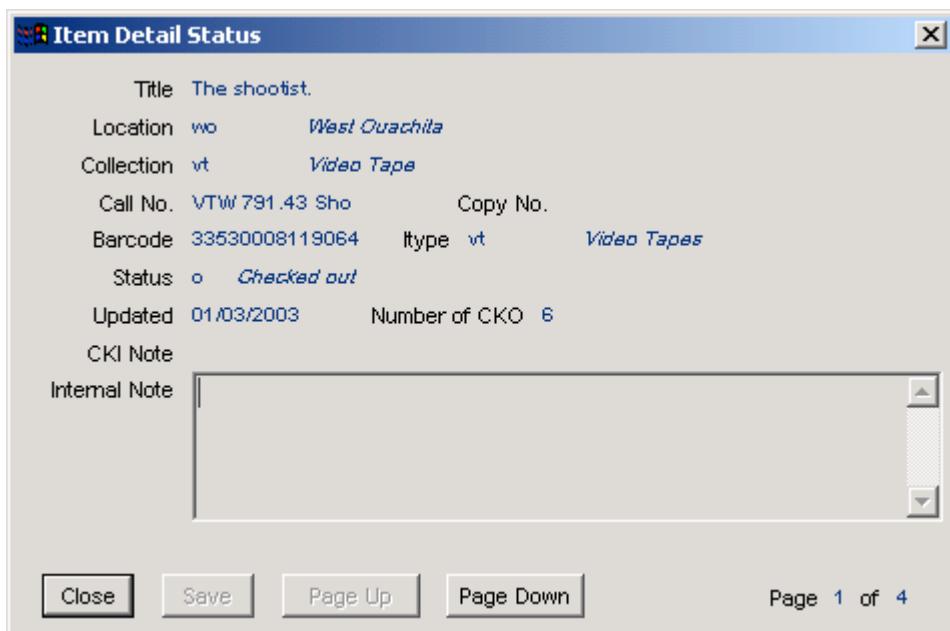


By paging down, you can see the prior circ info, or the previous patron.



Last Patron and Current Status

Remember there is a change in terminology. Last Patrons are called Prior Circ Info and Current Status is called Current Borrower. You can find both pieces of information by Searching an item, and showing Detail Status. The second page of this information shows the Current Borrower and the third page is the Prior Circ Info. Page 1 give bibliographic information and Page 4 gives you purchasing information, including the price of the item.



Bibliographic information (page 1)

Item Detail Status

Current Borrower	New	Delete	1 of 1
Name	Mccain Sonny	Btype	st STAFF
Location	mo Main Branch	Time	05:27PM
CKO Date	01/03/2003	Loc	wo West Ouachita
Due Date	01/10/2003	Time	
Proxy For		Btype	
Barcode			

Close **Save** **Page Up** **Page Down** Page 2 of 4

Current Borrower (page 2)

Item Detail Status

Prior Circ Info	New	Delete	Wiley, Mrs. Mary: 12/14/02	1 of 1
Borrower	Wiley, Mrs. Mary			
Barcode	23530000384841	2nd ID		
CKI Date	12/14/2002	Time	10:10AM	Location
CKO Date	12/07/2002	Time	10:38AM	Location
Renewals	0	by Phone	0	by OPAC
			0	No. of Pieces

Close **Save** **Page Up** **Page Down** Page 3 of 4

Prior Circ Info (page 3)

Hot Keys

F2 – New Search

F4 – Allows you to search for a new borrower

F4 + ESC – Clears the CKO window

F5 – Allows you to register a new borrower

F8 – Toggles between CKO and CKI

F12 – Lists codes available at a Code button

ESC – Allows you to close the window you are currently in.

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